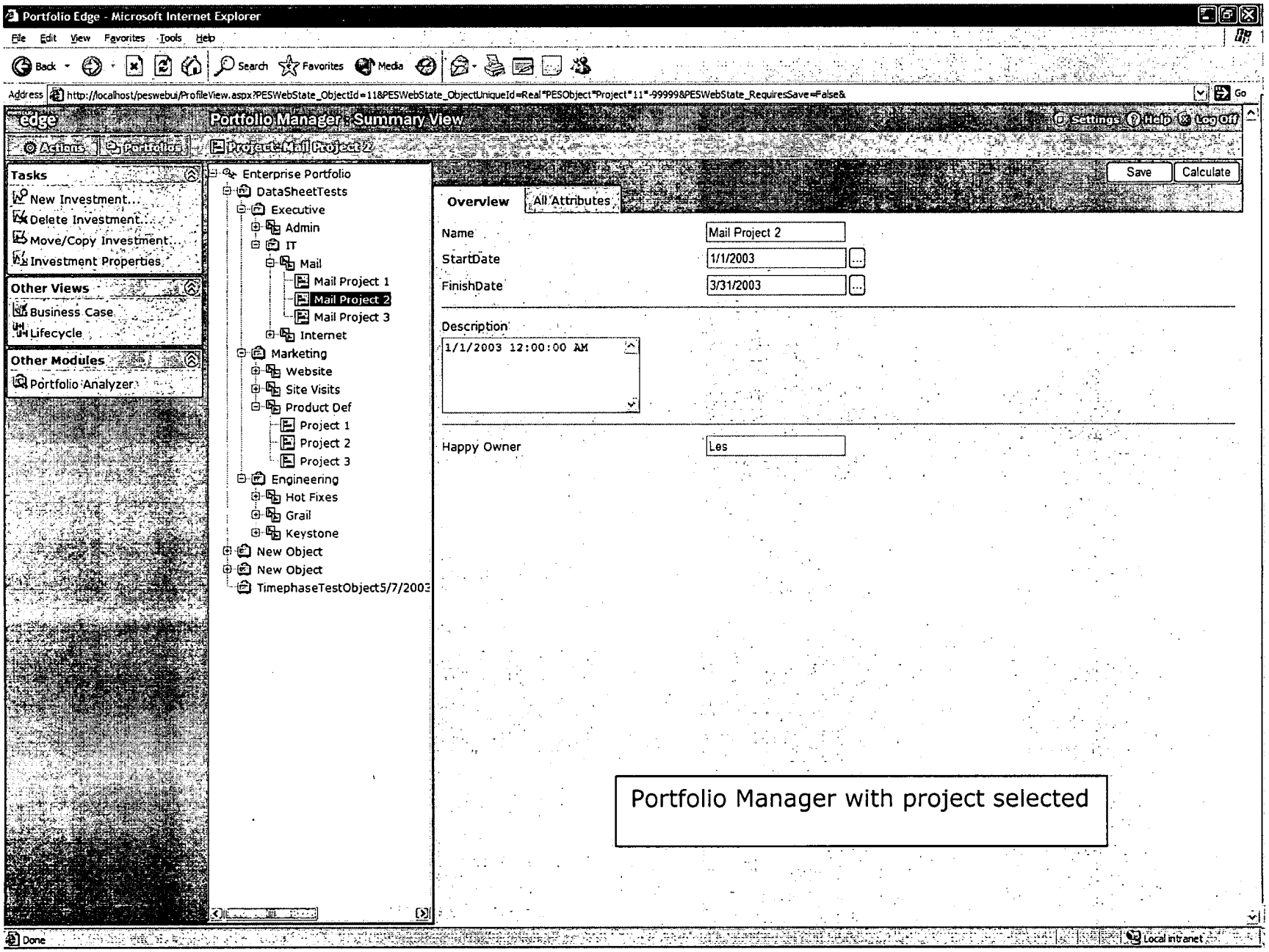
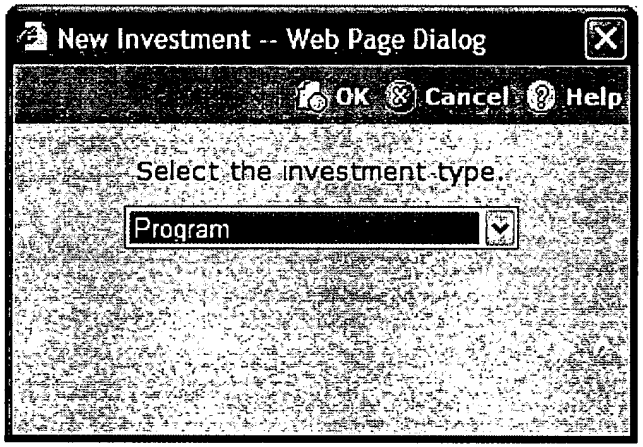
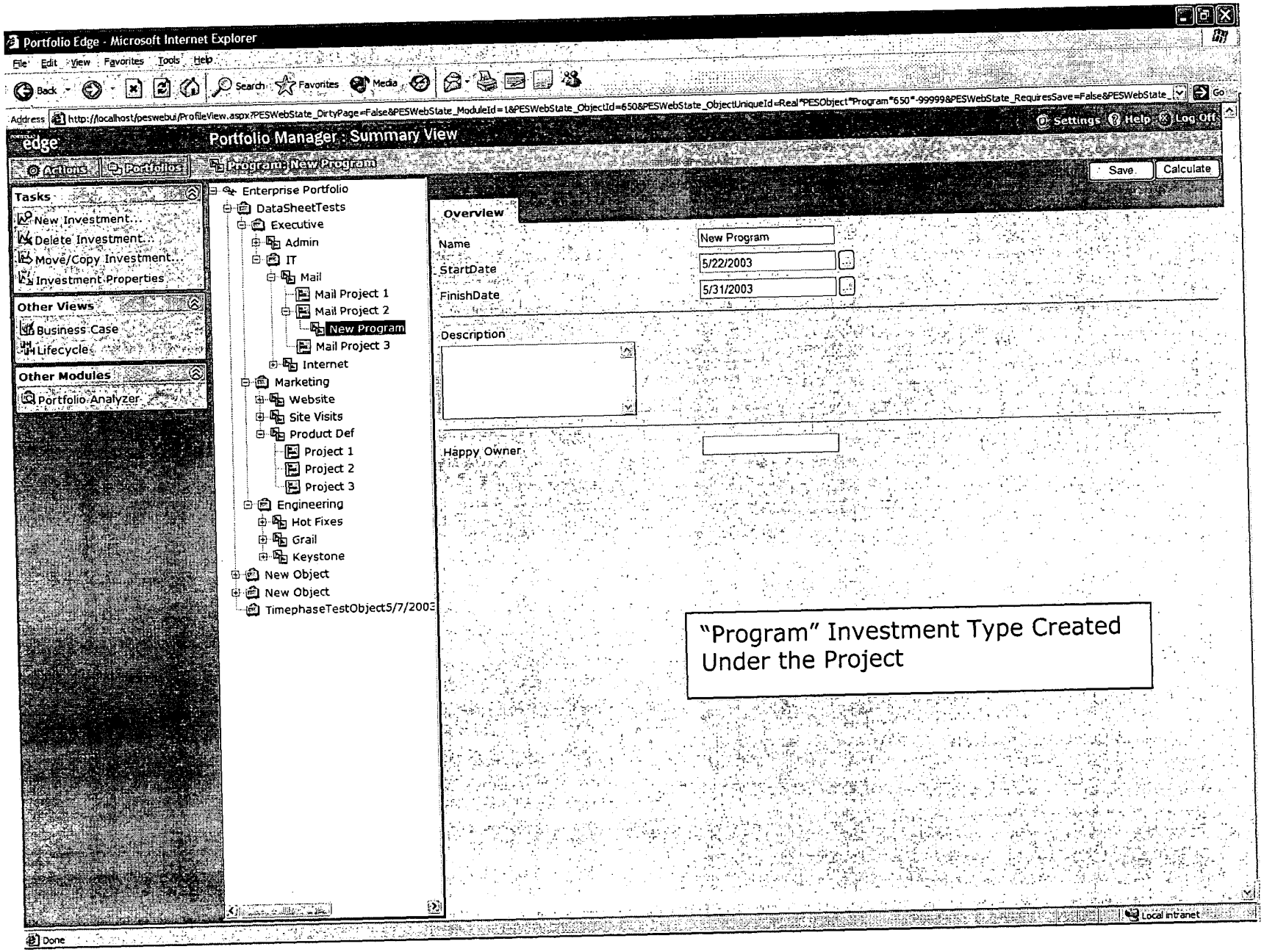
APPENDIX A

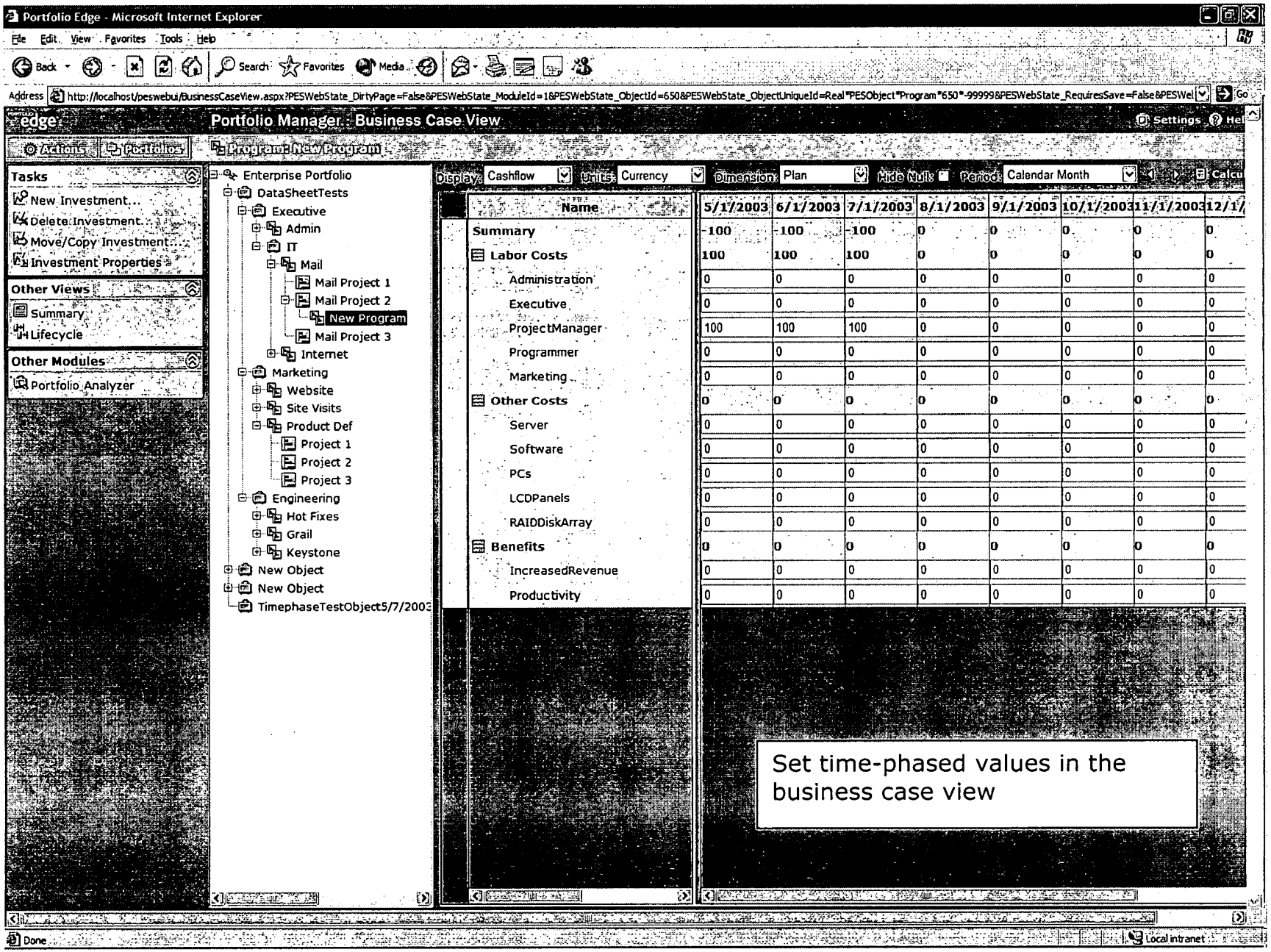


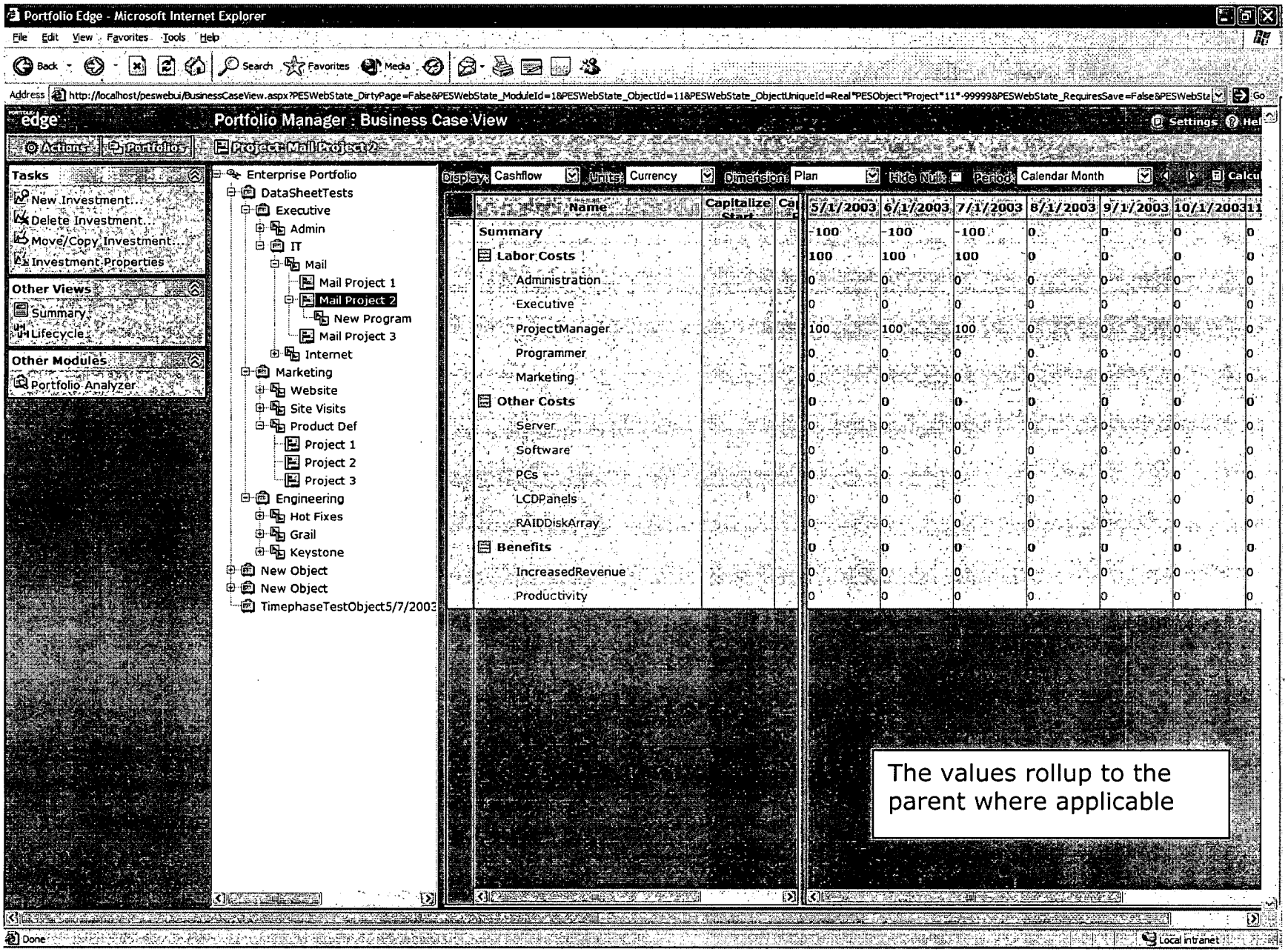
Portfolio Manager with project selected

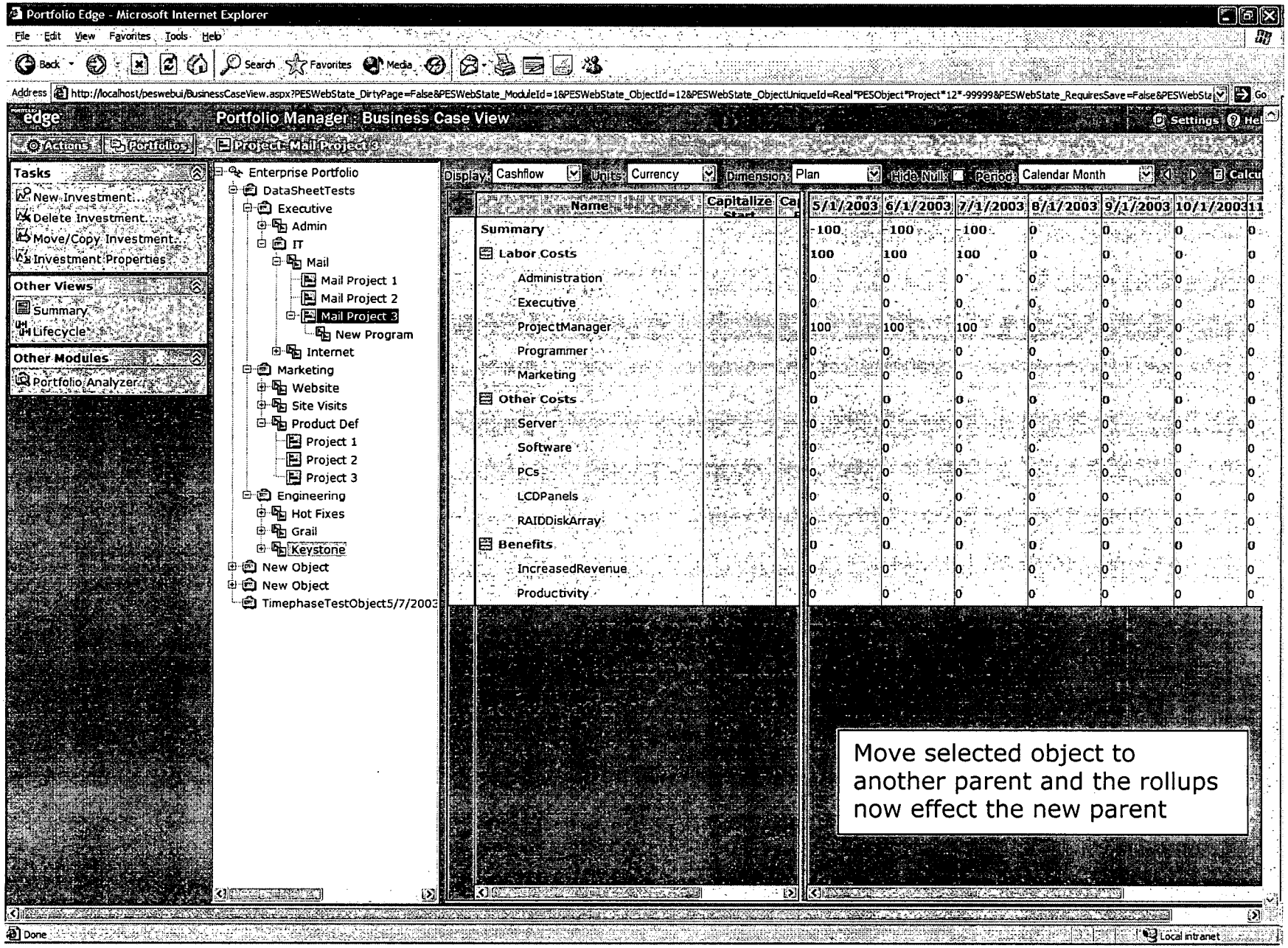
Create "Program" Investment Type Under the Project

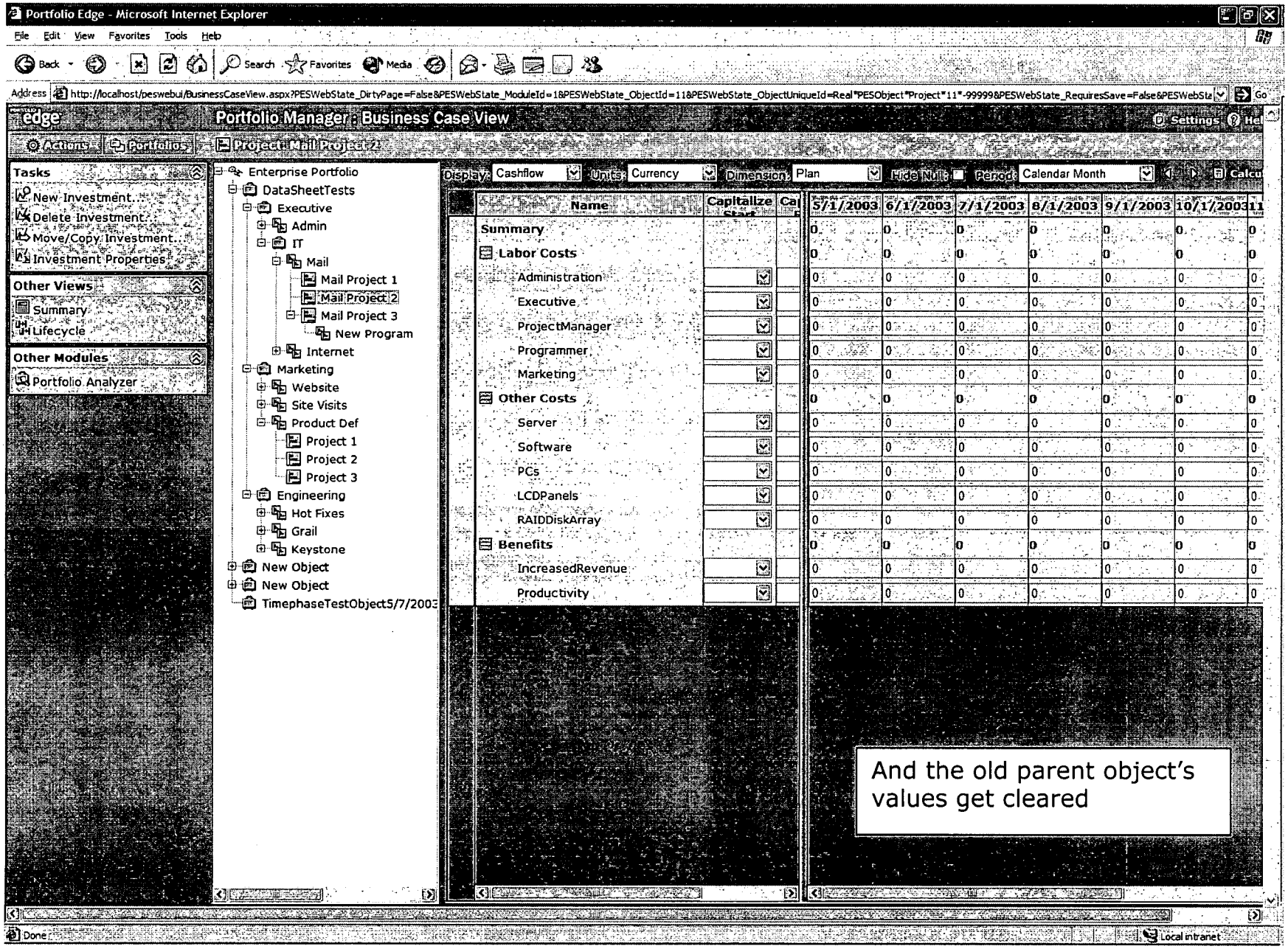


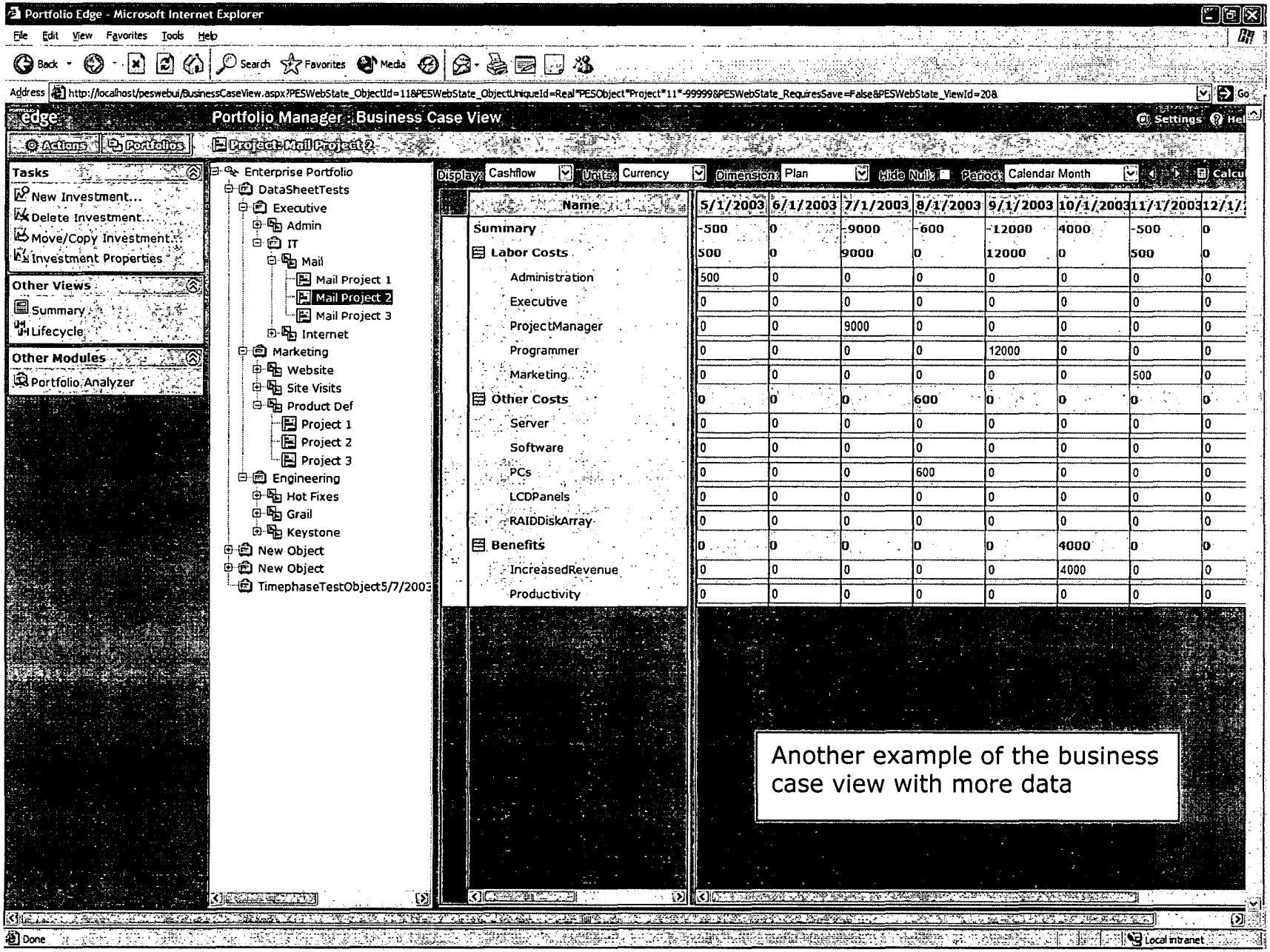

Portfolio Edge - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://localhost/peswebui/ProfileView.aspx?PESWebState_DirtyPage=False&PESWebState_ModuleId=1&PESWebState_ObjectId=650&PESWebState_ObjectUniqueId=Real*PESObject*Program*650*-99999&PESWebState_RequiresSave=False&PESWebState_
Go
edge
Portfolio Manager : Summary View
Settings Help Log Off
Admins Portfolios Programs: New Program
Save Calculate
Tasks
New Investment...
Delete Investment...
Move/Copy Investment...
Investment Properties
Other Views
Business Case
Lifecycle
Other Modules
Portfolio Analyzer
Enterprise Portfolio
DataSheetTests
Executive
Admin
IT
Mail
Mail Project 1
Mail Project 2
New Program
Mail Project 3
Internet
Marketing
Website
Site Visits
Product Def
Project 1
Project 2
Project 3
Engineering
Hot Fixes
Grail
Keystone
New Object
New Object
TimephaseTestObject5/7/2003
Overview
Name
New Program
StartDate
5/22/2003
FinishDate
5/31/2003
Description
Happy Owner
"Program" Investment Type Created Under the Project
Local intranet
Done

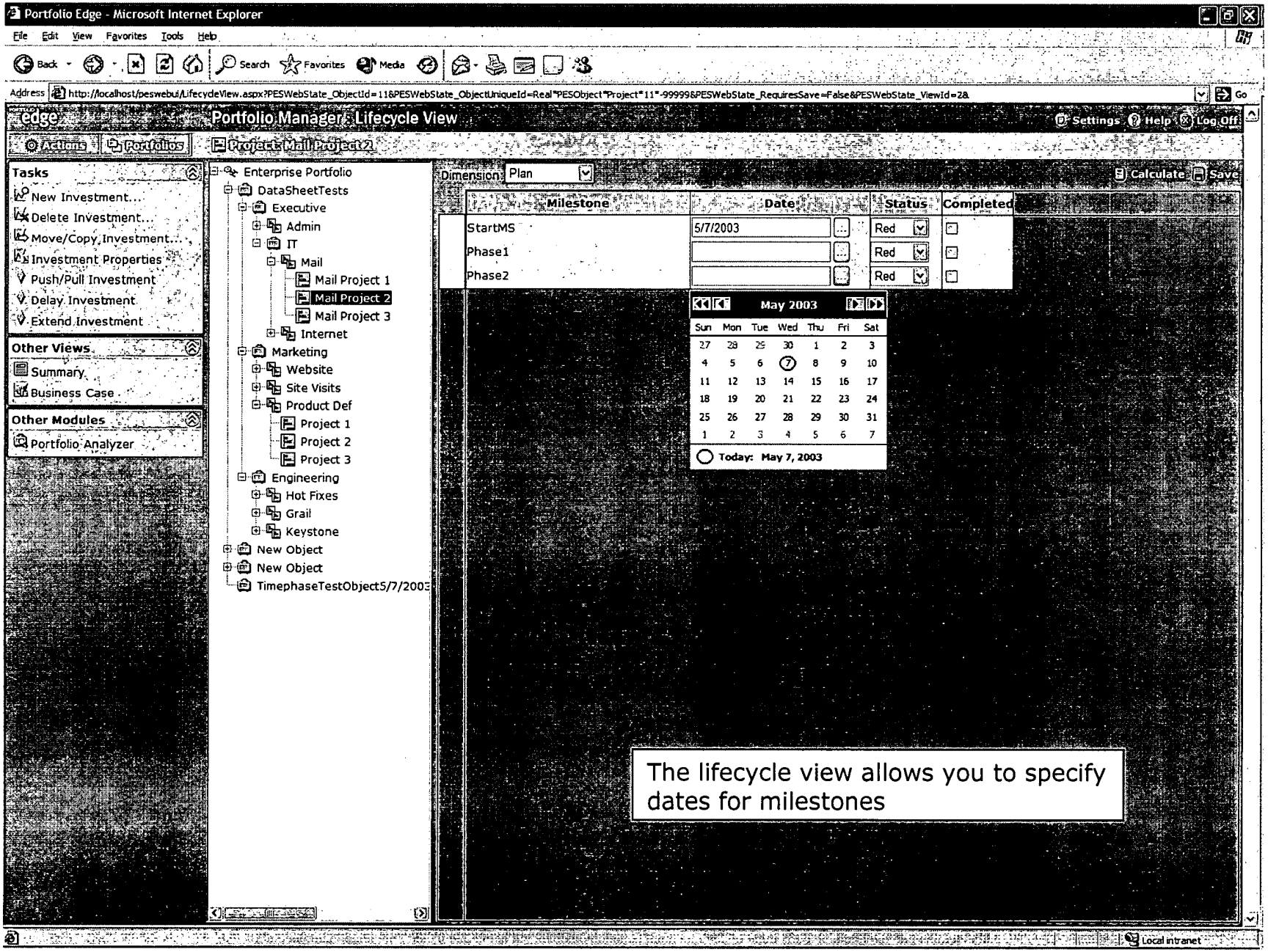

Portfolio Edge - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://localhost/peswebui/BusinessCaseView.aspx?PESWebState_DirtyPage=False&PESWebState_ModuleId=1&PESWebState_ObjectId=650&PESWebState_ObjectUniqueId=Real*PESObject*Program*650*-99999&PESWebState_RequiresSave=False&PESWe
edge
Portfolio Manager : Business Case View
Settings
Actions
Portfolios
Program: New Program
Tasks
New Investment...
Delete Investment...
Move/Copy Investment...
Investment Properties
Other Views
Summary
Lifecycle
Other Modules
Portfolio Analyzer
Enterprise Portfolio
DataSheetTests
Executive
Admin
IT
Mail
Mail Project 1
Mail Project 2
New Program
Mail Project 3
Internet
Marketing
Website
Site Visits
Product Def
Project 1
Project 2
Project 3
Engineering
Hot Fixes
Grail
Keystone
New Object
New Object
TimephaseTestObject5/7/2003
Display: Cashflow
Units: Currency
Dimension: Plan
Hide Null:
Periods: Calendar Month
Name
5/1/2003 6/1/2003 7/1/2003 8/1/2003 9/1/2003 10/1/2003 11/1/2003 12/1/
Summary 100 100 100 0 0 0 0 0
Labor Costs 100 100 100 0 0 0 0 0
Administration 0 0 0 0 0 0 0 0
Executive 0 0 0 0 0 0 0 0
ProjectManager 100 100 100 0 0 0 0 0
Programmer 0 0 0 0 0 0 0 0
Marketing 0 0 0 0 0 0 0 0
Other Costs 0 0 0 0 0 0 0 0
Server 0 0 0 0 0 0 0 0
Software 0 0 0 0 0 0 0 0
PCs 0 0 0 0 0 0 0 0
LCDPanels 0 0 0 0 0 0 0 0
RAIDDiskArray 0 0 0 0 0 0 0 0
Benefits 0 0 0 0 0 0 0 0
IncreasedRevenue 0 0 0 0 0 0 0 0
Productivity 0 0 0 0 0 0 0 0
Set time-phased values in the business case view
Done
Local intranet

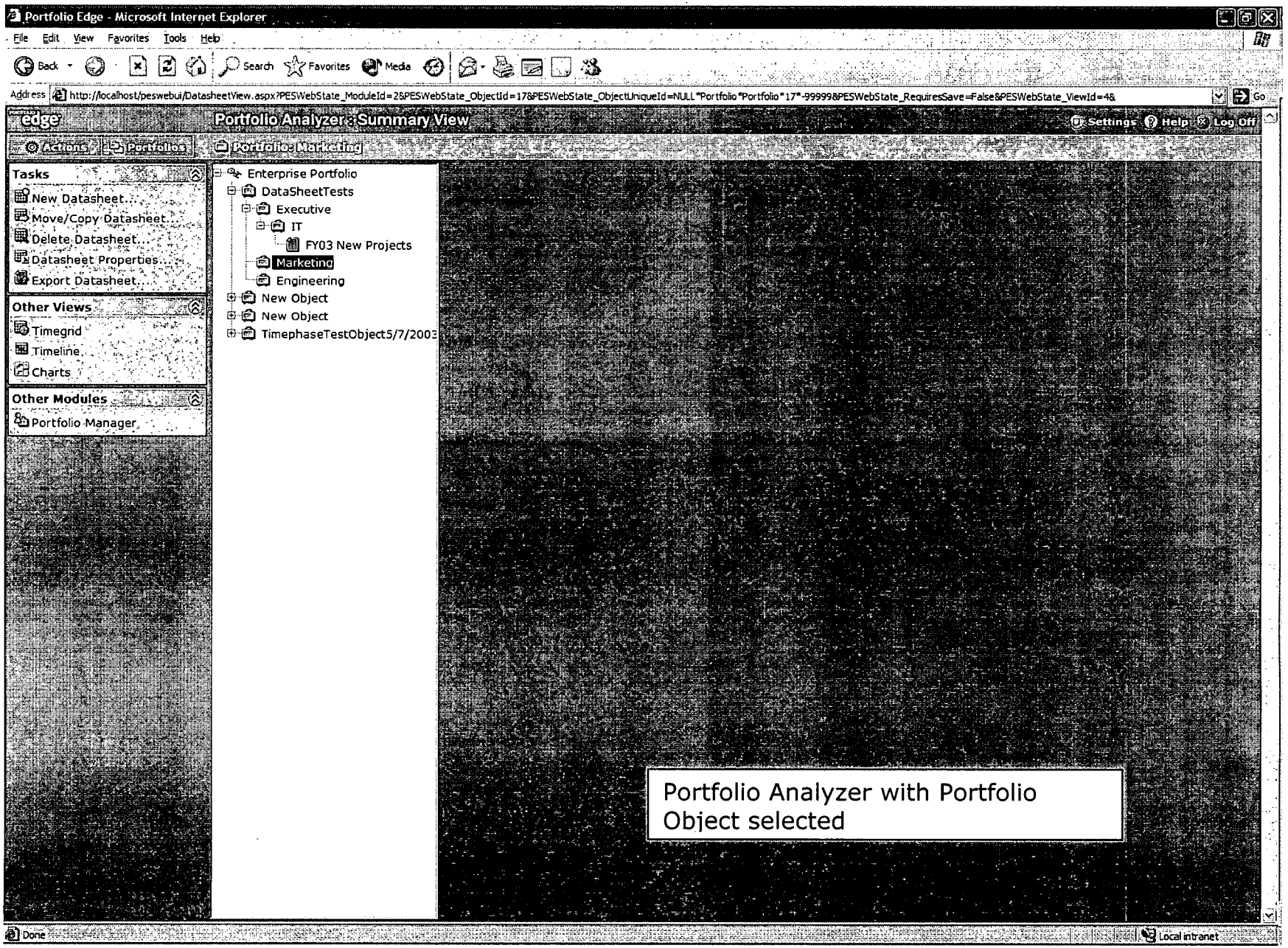

Portfolio Edge - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://localhost/peswebui/BusinessCaseView.aspx?PESWebState_DirtyPage=False&PESWebState_ModuleId=1&PESWebState_ObjectId=11&PESWebState_ObjectUniqueId=Real*PESObject*Project*11*-99999&PESWebState_RequiresSave=False&PESWebSta
edge
Portfolio Manager : Business Case View
Settings
Actions
Portfolios
Project: Mail Project 2
Tasks
New Investment...
Delete Investment
Move/Copy Investment...
Investment Properties
Other Views
Summary
Lifecycle
Other Modules
Portfolio Analyzer
Enterprise Portfolio
DataSheetTests
Executive
Admin
IT
Mail
Mail Project 1
Mail Project 2
New Program
Mail Project 3
Internet
Marketing
Website
Site Visits
Product Def
Project 1
Project 2
Project 3
Engineering
Hot Fixes
Grail
Keystone
New Object
New Object
TimephaseTestObject5/7/2003
Display: Cashflow
Units: Currency
Dimension: Plan
Hide Null:
Period: Calendar Month
Name
Capitalize
5/1/2003
6/1/2003
7/1/2003
8/1/2003
9/1/2003
10/1/2003
Summary -100 -100 -100 0 0 0 0
Labor Costs 100 100 100 0 0 0 0
Administration 0 0 0 0 0 0 0
Executive 0 0 0 0 0 0 0
ProjectManager 100 100 100 0 0 0 0
Programmer 0 0 0 0 0 0 0
Marketing 0 0 0 0 0 0 0
Other Costs 0 0 0 0 0 0 0
Server 0 0 0 0 0 0 0
Software 0 0 0 0 0 0 0
PCs 0 0 0 0 0 0 0
LCDPanels 0 0 0 0 0 0 0
RAIDDiskArray 0 0 0 0 0 0 0
Benefits 0 0 0 0 0 0 0
IncreasedRevenue 0 0 0 0 0 0 0
Productivity 0 0 0 0 0 0 0
The values rollup to the parent where applicable
Done
Local intranet

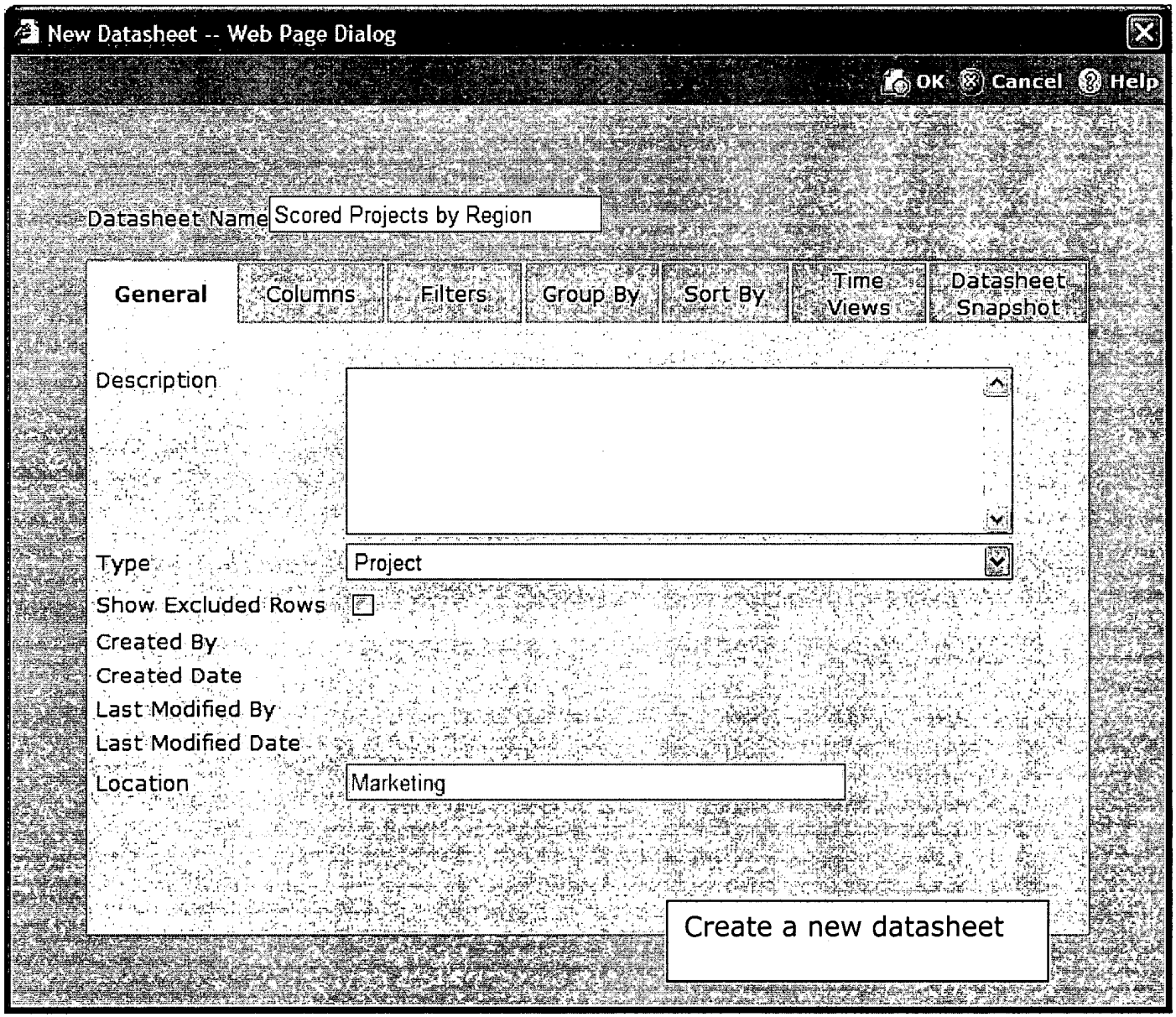

Portfolio Edge - Microsoft Internet Explorer
Portfolio Manager - Business Case View
Tasks
New Investment...
Delete Investment...
Move/Copy Investment...
Investment Properties...
Other Views
Summary
Lifecycle
Other Modules
Portfolio Analyzer
Enterprise Portfolio
DataSheetTests
Executive
Admin
IT
Mail
Mail Project 1
Mail Project 2
Mail Project 3
New Program
Internet
Marketing
Website
Site Visits
Product Def
Project 1
Project 2
Project 3
Engineering
Hot Fixes
Grail
Keystone
New Object
New Object
TimephaseTestObject5/7/2003
Move selected object to another parent and the rollups now effect the new parent

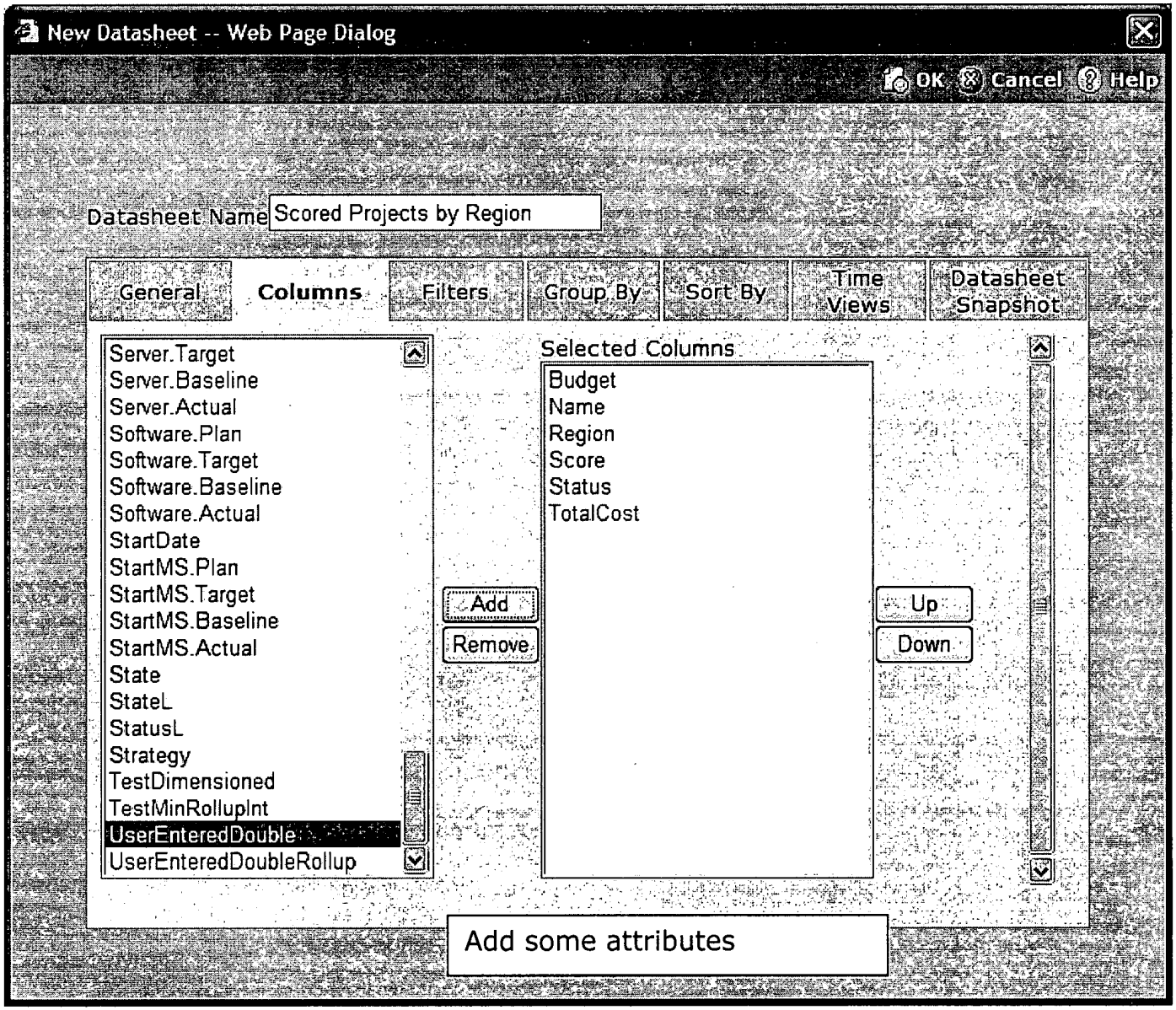

Portfolio Edge - Microsoft Internet Explorer
Portfolio Manager : Business Case View
Tasks
New Investment...
Delete Investment...
Move/Copy Investment...
Investment Properties...
Other Views
Summary
Lifecycle
Other Modules
Portfolio Analyzer
Enterprise Portfolio
DataSheetTests
Executive
Admin
IT
Mail
Mail Project 1
Mail Project 2
Mail Project 3
New Program
Internet
Marketing
Website
Site Visits
Product Def
Project 1
Project 2
Project 3
Engineering
Hot Fixes
Grail
Keystone
New Object
New Object
TimephaseTestObject5/7/2003
Display: Cashflow
Units: Currency
Dimension: Plan
Hide Null:
Periods: Calendar Month
Name
Capitalize Start
5/1/2003
6/1/2003
7/1/2003
8/1/2003
9/1/2003
10/1/2003
Summary
Labor Costs
Administration
Executive
ProjectManager
Programmer
Marketing
Other Costs
Server
Software
PCs
LCDPanels
RAIDDiskArray
Benefits
IncreasedRevenue
Productivity
And the old parent object's values get cleared

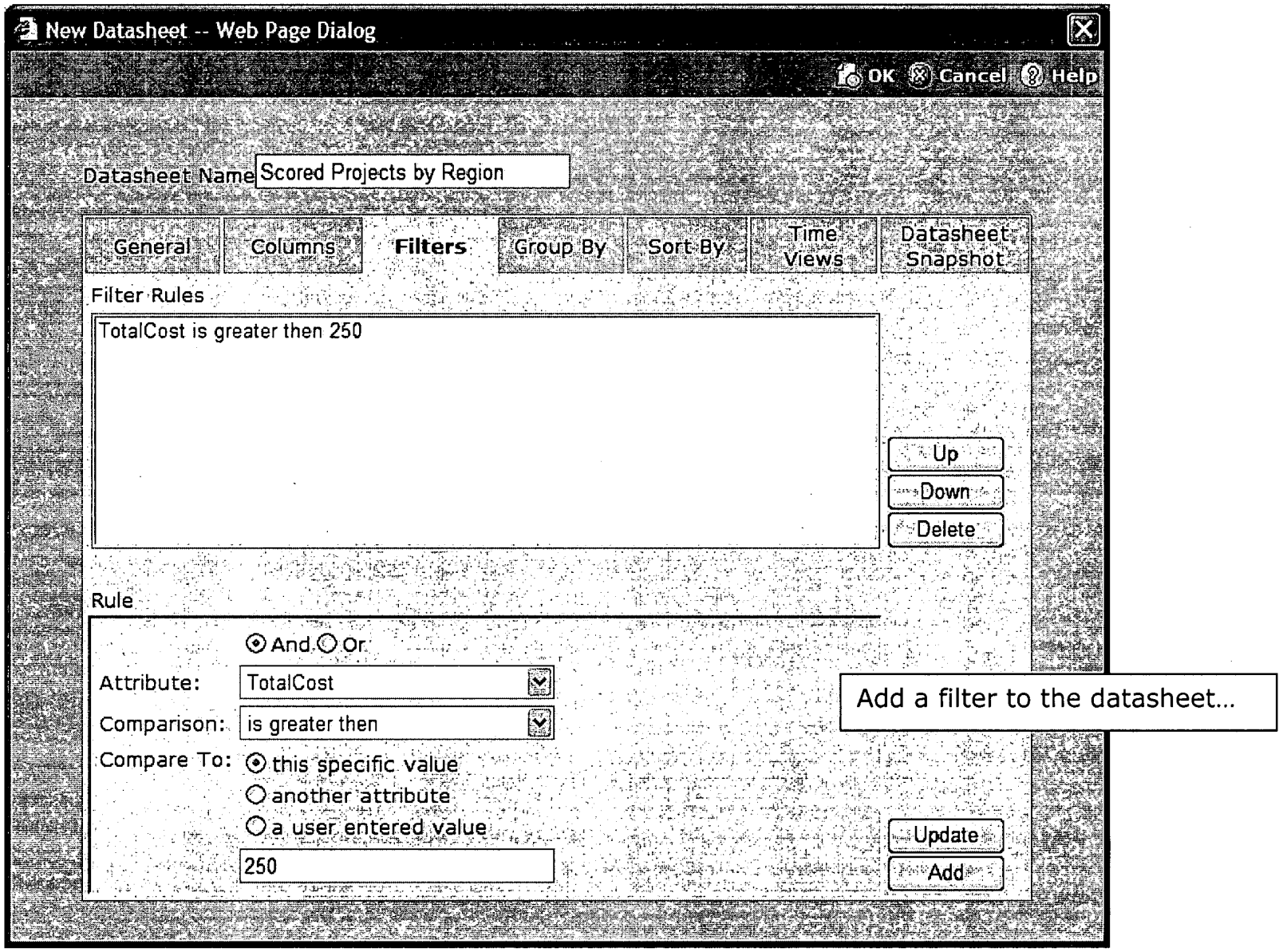

Portfolio Edge - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://localhost/peswebui/BusinessCaseView.aspx?PESWebState_ObjectId=11&PESWebState_ObjectUniqueId=Real*PESObject*Project*11*-99999&PESWebState_RequiresSave=False&PESWebState_ViewId=208
edge
Portfolio Manager : Business Case View
Settings
Actions
Portfolios
Project: Mail Project 2
Tasks
New Investment...
Delete Investment...
Move/Copy Investment...
Investment Properties
Other Views
Summary
Lifecycle
Other Modules
Portfolio Analyzer
Enterprise Portfolio
DataSheetTests
Executive
Admin
IT
Mail
Mail Project 1
Mail Project 2
Mail Project 3
Internet
Marketing
Website
Site Visits
Product Def
Project 1
Project 2
Project 3
Engineering
Hot Fixes
Grail
Keystone
New Object
New Object
TimephaseTestObject5/7/2003
Display: Cashflow
Units: Currency
Dimensions: Plan
Hide Null:
Period: Calendar Month
Calcu
Name
5/1/2003 6/1/2003 7/1/2003 8/1/2003 9/1/2003 10/1/2003 11/1/2003 12/1/
Summary -500 0 -9000 -600 -12000 4000 -500 0
Labor Costs 500 0 9000 0 12000 0 500 0
Administration 500 0 0 0 0 0 0 0
Executive 0 0 0 0 0 0 0 0
ProjectManager 0 0 9000 0 0 0 0 0
Programmer 0 0 0 0 12000 0 0 0
Marketing 0 0 0 0 0 0 500 0
Other Costs 0 0 0 600 0 0 0 0
Server 0 0 0 0 0 0 0 0
Software 0 0 0 0 0 0 0 0
PCs 0 0 0 600 0 0 0 0
LCDPanels 0 0 0 0 0 0 0 0
RAIDDiskArray 0 0 0 0 0 0 0 0
Benefits 0 0 0 0 0 4000 0 0
IncreasedRevenue 0 0 0 0 0 4000 0 0
Productivity 0 0 0 0 0 0 0 0
Another example of the business case view with more data
Done
Local intranet

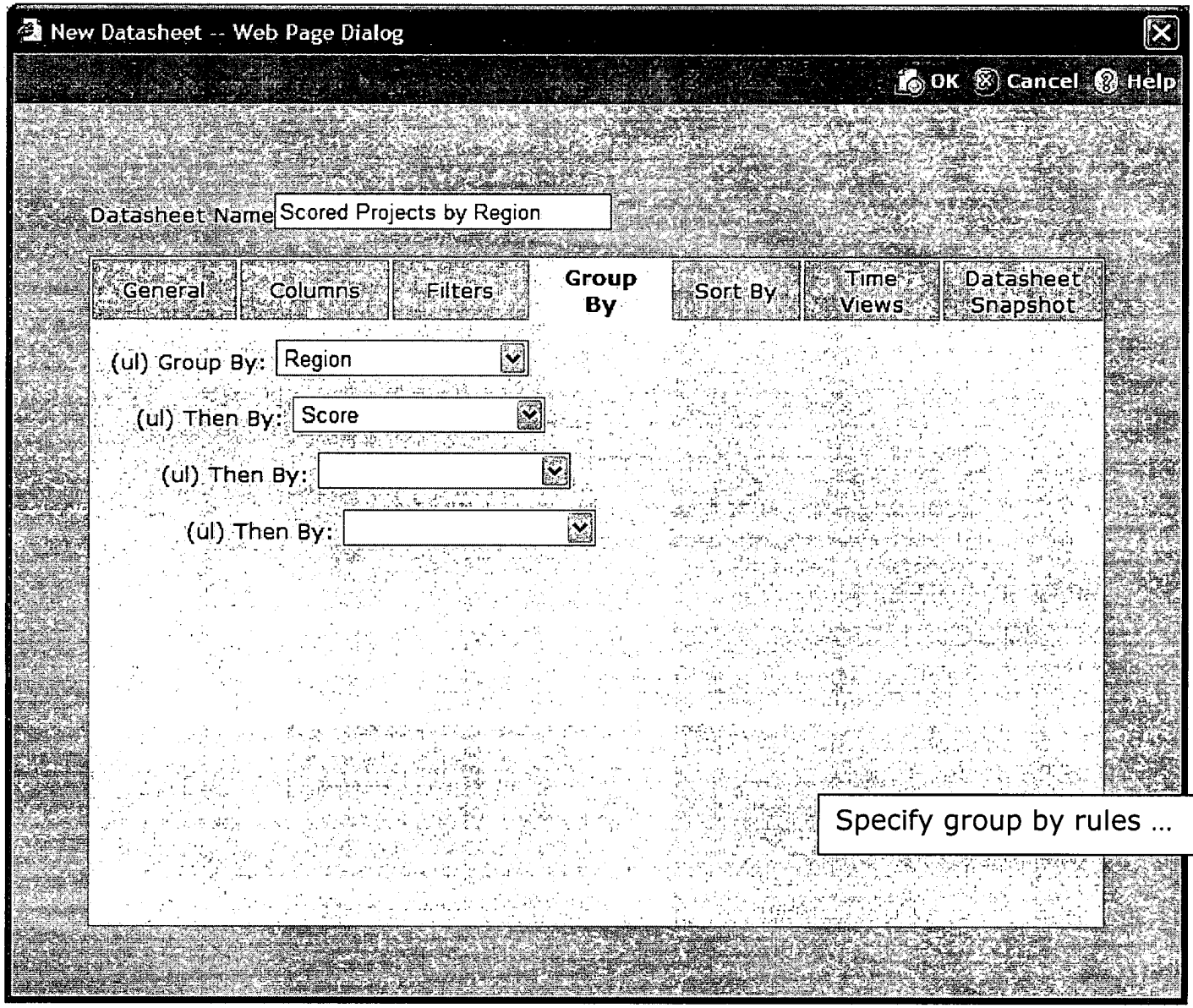

Portfolio Edge - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://localhost/peswebui/LifecycleView.aspx?PESWebState_ObjectId=118PESWebState_ObjectUniqueId=Real*PESObject*Project*11*-99999&PESWebState_RequiresSave=False&PESWebState_ViewId=28
Go
edge
Portfolio Manager: Lifecycle View
Settings Help Log Off
Actions Portfolios
Projects: Mail Project 2
Tasks
New Investment...
Delete Investment...
Move/Copy Investment...
Investment Properties
Push/Pull Investment
Delay Investment
Extend Investment
Other Views
Summary
Business Case
Other Modules
Portfolio Analyzer
Enterprise Portfolio
DataSheetTests
Executive
Admin
IT
Mail
Mail Project 1
Mail Project 2
Mail Project 3
Internet
Marketing
Website
Site Visits
Product Def
Project 1
Project 2
Project 3
Engineering
Hot Fixes
Grail
Keystone
New Object
New Object
TimephaseTestObject5/7/2003
Dimension: Plan
Calculate Save
Milestone Date Status Completed
StartMS 5/7/2003 Red
Phase1 Red
Phase2 Red
May 2003
Sun Mon Tue Wed Thu Fri Sat
27 28 29 30 1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31
1 2 3 4 5 6 7
Today: May 7, 2003
The lifecycle view allows you to specify dates for milestones
Local intranet

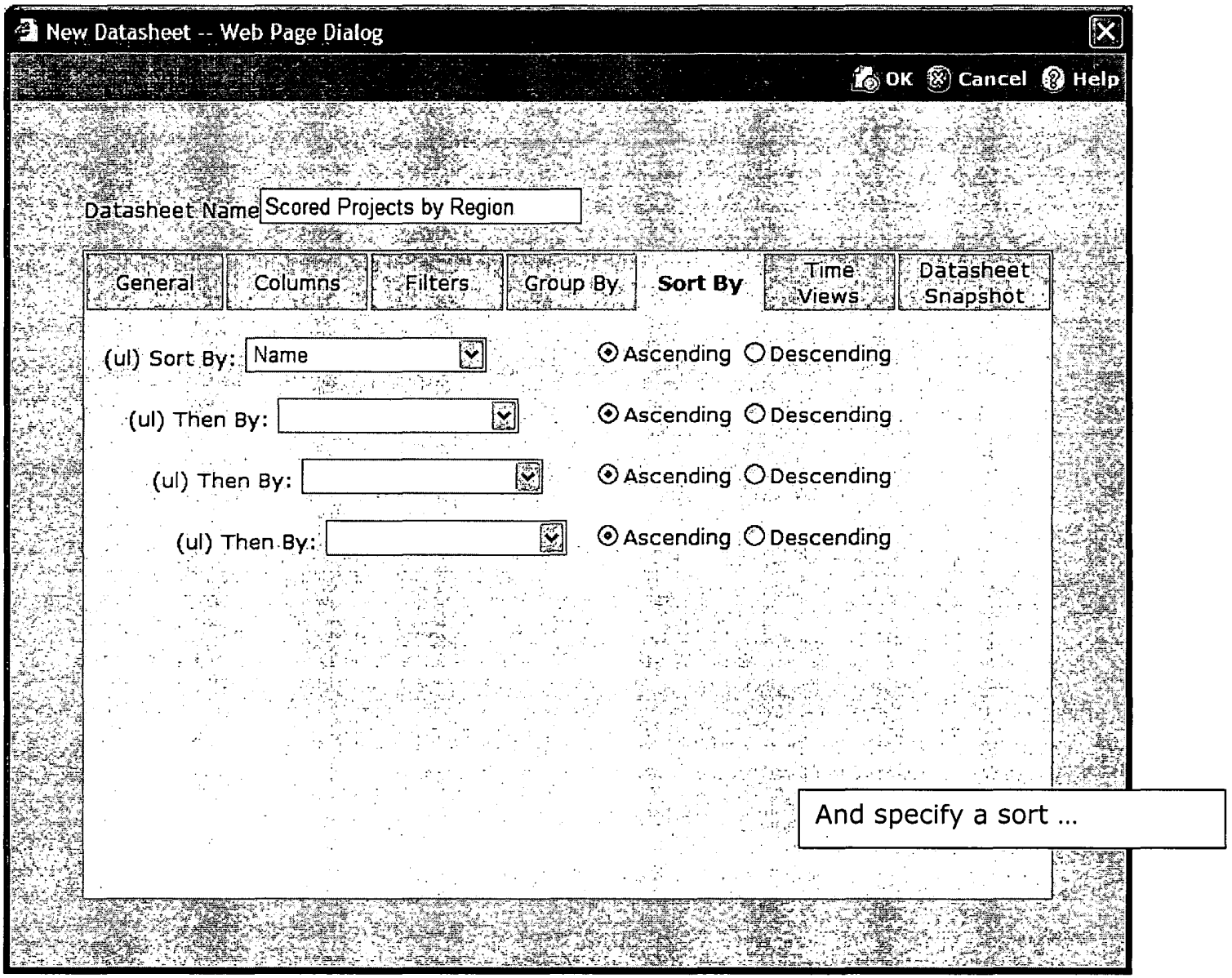

Portfolio Edge - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://localhost/peswebui/DatasheetView.aspx?PESWebState_ModuleId=2&PESWebState_ObjectId=17&PESWebState_ObjectUniqueId=NULL*Portfolio*Portfolio*17*-99999&PESWebState_RequiresSave=False&PESWebState_ViewId=4&
Go
edge
Portfolio Analyzer: Summary View
Settings Help Log Off
Actions Portfolios
Portfolios: Marketing
Tasks
New Datasheet...
Move/Copy Datasheet...
Delete Datasheet...
Datasheet Properties...
Export Datasheet...
Other Views
Timegrid
Timeline
Charts
Other Modules
Portfolio Manager
Enterprise Portfolio
DataSheetTests
Executive
IT
FY03 New Projects
Marketing
Engineering
New Object
New Object
TimephaseTestObject5/7/2003
Portfolio Analyzer with Portfolio Object selected
Done
Local intranet

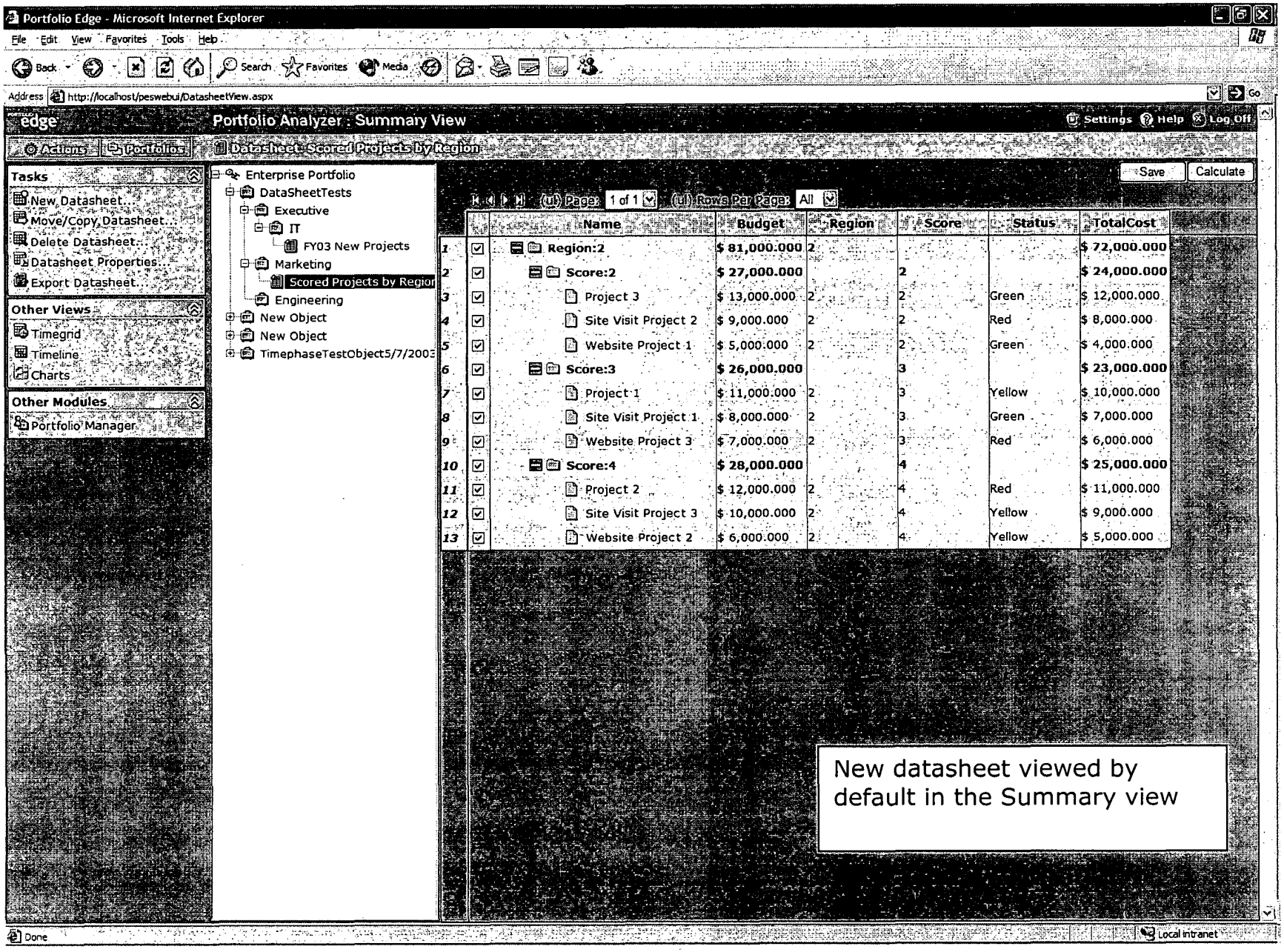

New Datasheet -- Web Page Dialog
OK
Cancel
Help
Datasheet Name
Scored Projects by Region
General
Columns
Filters
Group By
Sort By
Time Views
Datasheet Snapshot
Description
Type
Project
Show Excluded Rows
Created By
Created Date
Last Modified By
Last Modified Date
Location
Marketing
Create a new datasheet

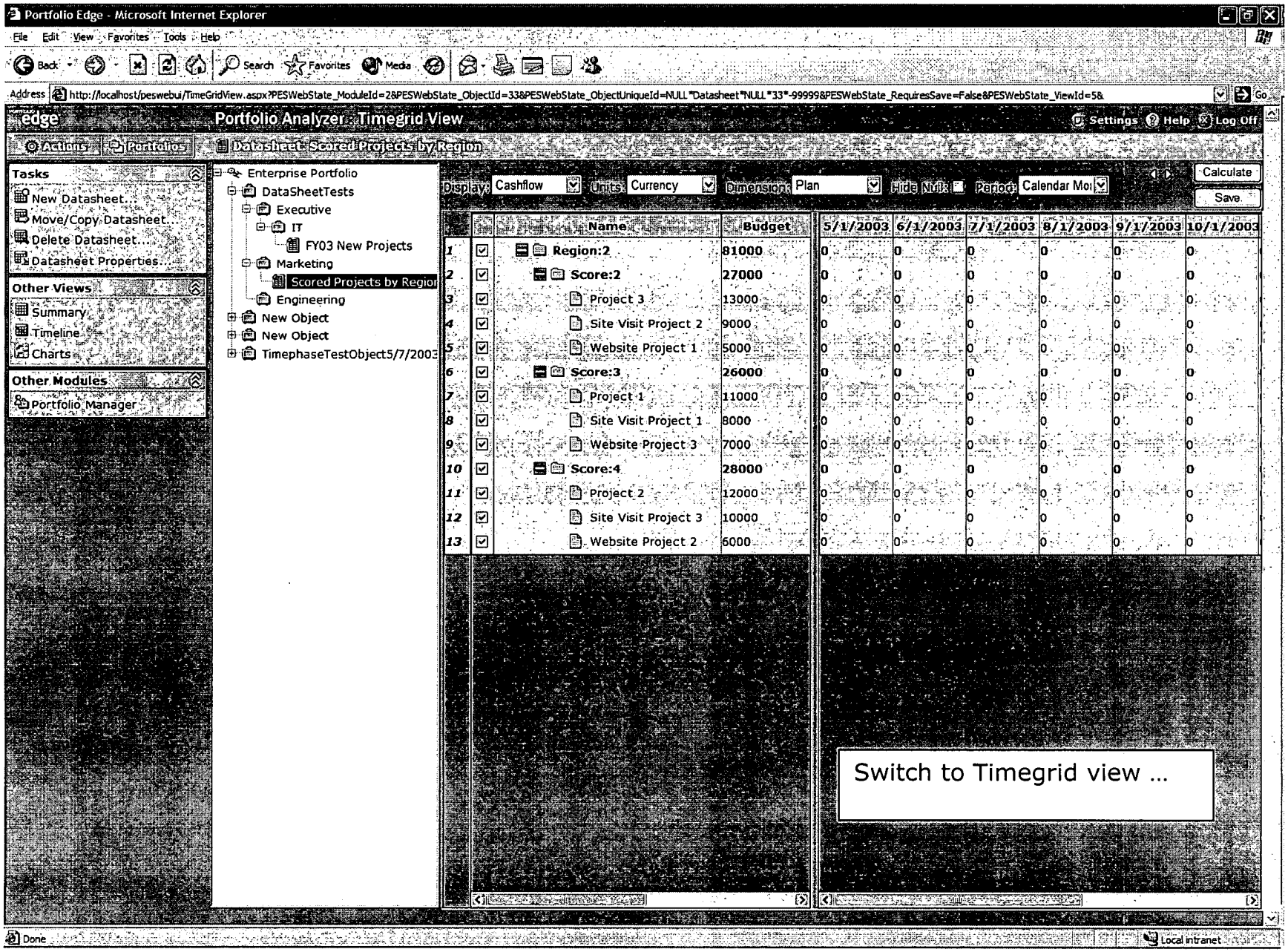

New Datasheet -- Web Page Dialog
OK
Cancel
Help
Datasheet Name
Scored Projects by Region
General
Columns
Filters
Group By
Sort By
Time Views
Datasheet Snapshot
Server.Target
Server.Baseline
Server.Actual
Software.Plan
Software.Target
Software.Baseline
Software.Actual
StartDate
StartMS.Plan
StartMS.Target
StartMS.Baseline
StartMS.Actual
State
StateL
StatusL
Strategy
TestDimensioned
TestMinRollupInt
UserEnteredDouble
UserEnteredDoubleRollup
Add
Remove
Selected Columns
Budget
Name
Region
Score
Status
TotalCost
Up
Down
Add some attributes

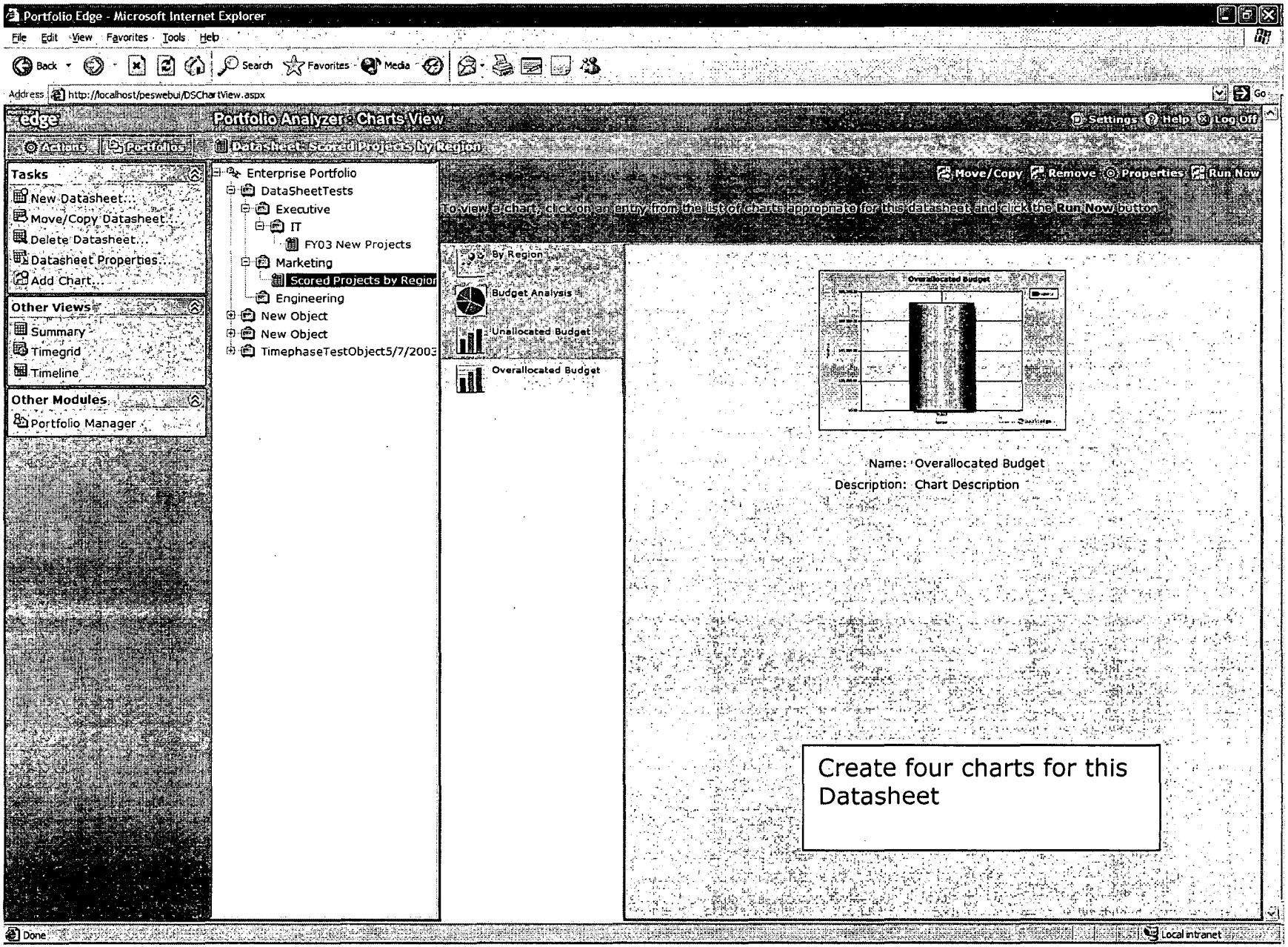

New Datasheet -- Web Page Dialog
OK
Cancel
Help
Datasheet Name
Scored Projects by Region
General
Columns
Filters
Group By
Sort By
Time Views
Datasheet Snapshot
Filter Rules
TotalCost is greater then 250
Up
Down
Delete
Rule
And
Or
Attribute:
TotalCost
Comparison:
is greater then
Compare To:
this specific value
another attribute
a user entered value
250
Update
Add
Add a filter to the datasheet...

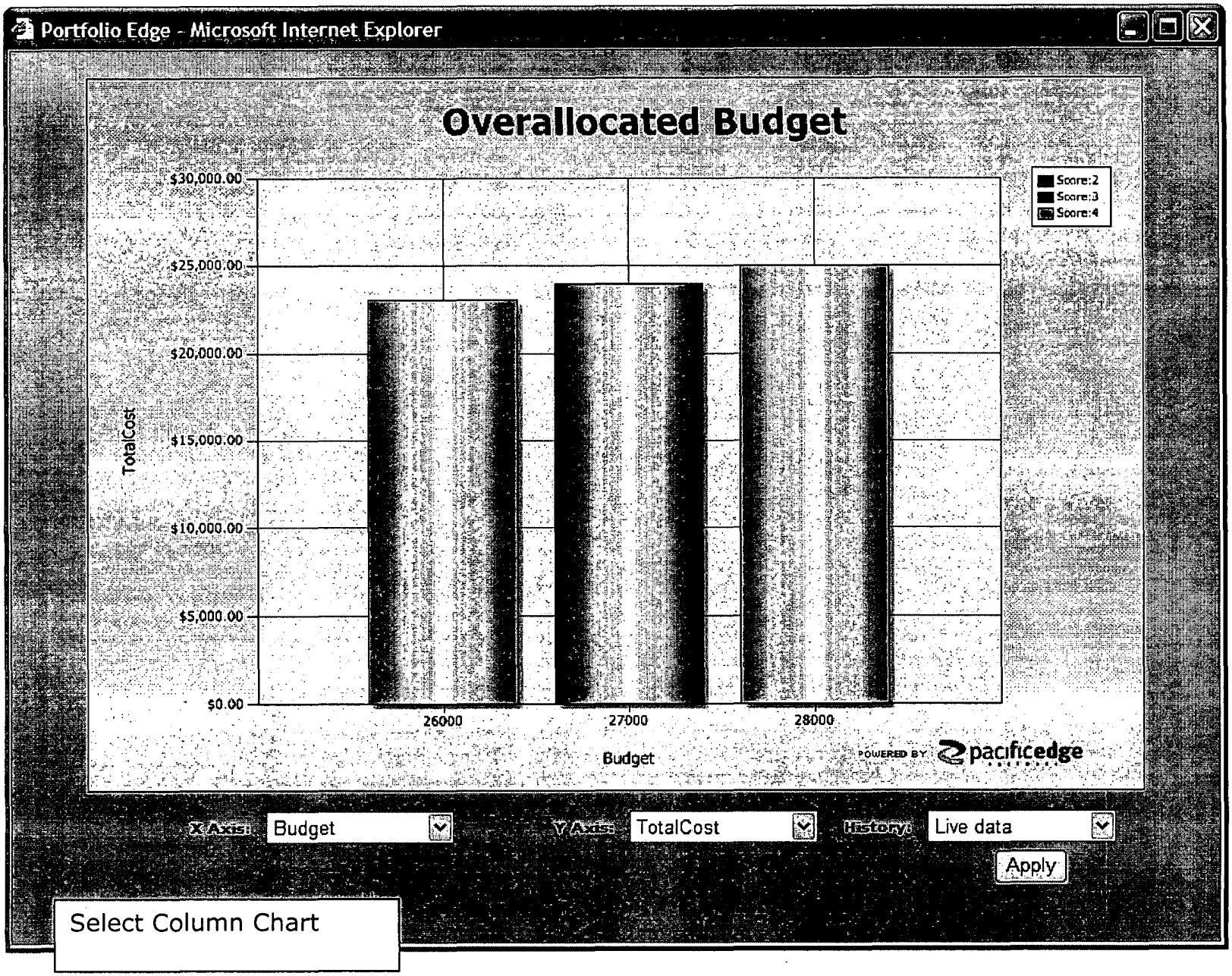

New Datasheet -- Web Page Dialog
OK
Cancel
Help
Datasheet Name
Scored Projects by Region
General
Columns
Filters
Group By
Sort By
Time Views
Datasheet Snapshot
(ul) Group By:
Region
(ul) Then By:
Score
(ul) Then By:
(ul) Then By:
Specify group by rules ...

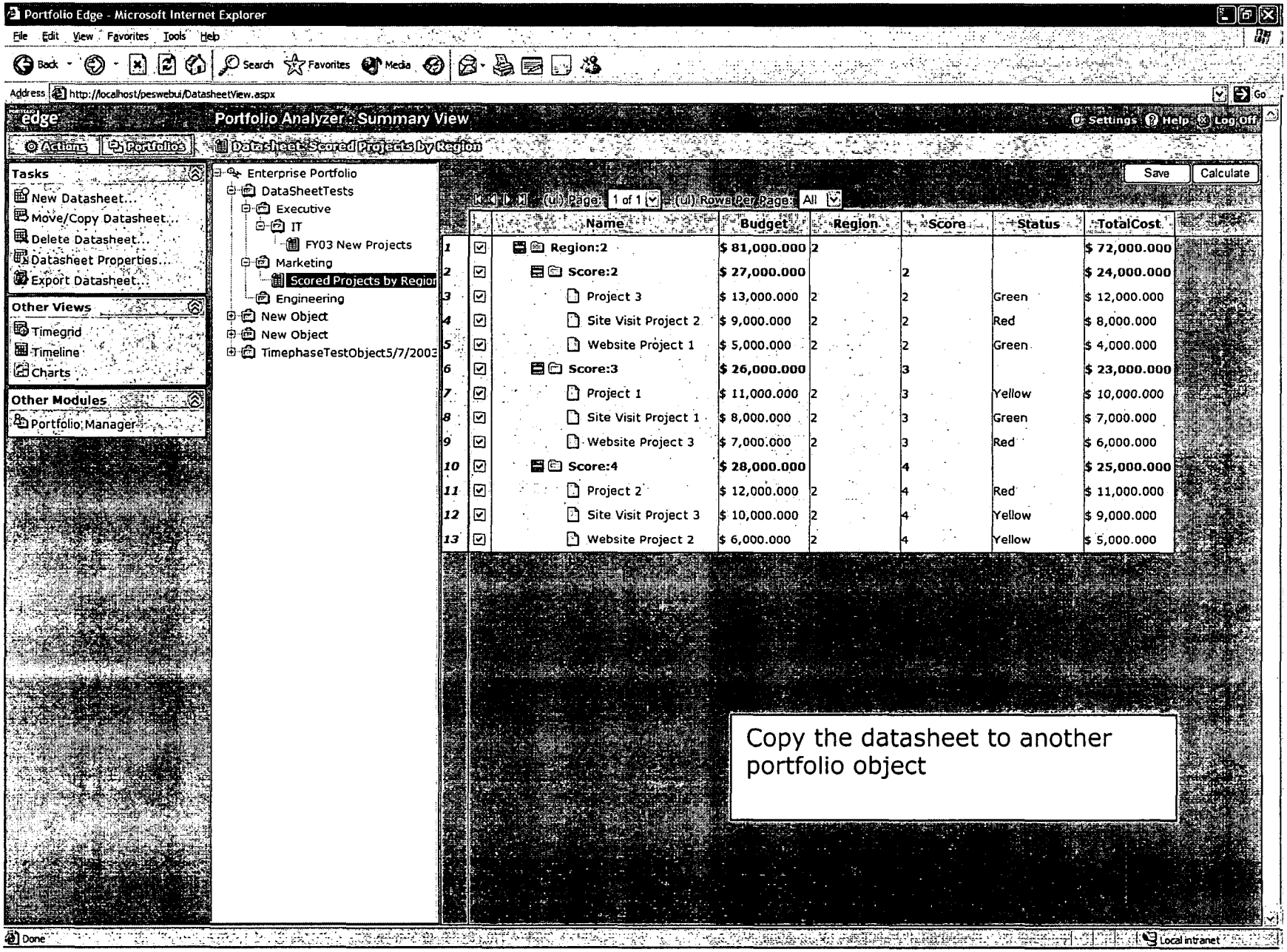

New Datasheet -- Web Page Dialog
OK
Cancel
Help
Datasheet Name
Scored Projects by Region
General
Columns
Filters
Group By
Sort By
Time Views
Datasheet Snapshot
(ul) Sort By:
Name
Ascending
Descending
(ul) Then By:
Ascending
Descending
(ul) Then By:
Ascending
Descending
(ul) Then By:
Ascending
Descending
And specify a sort ...

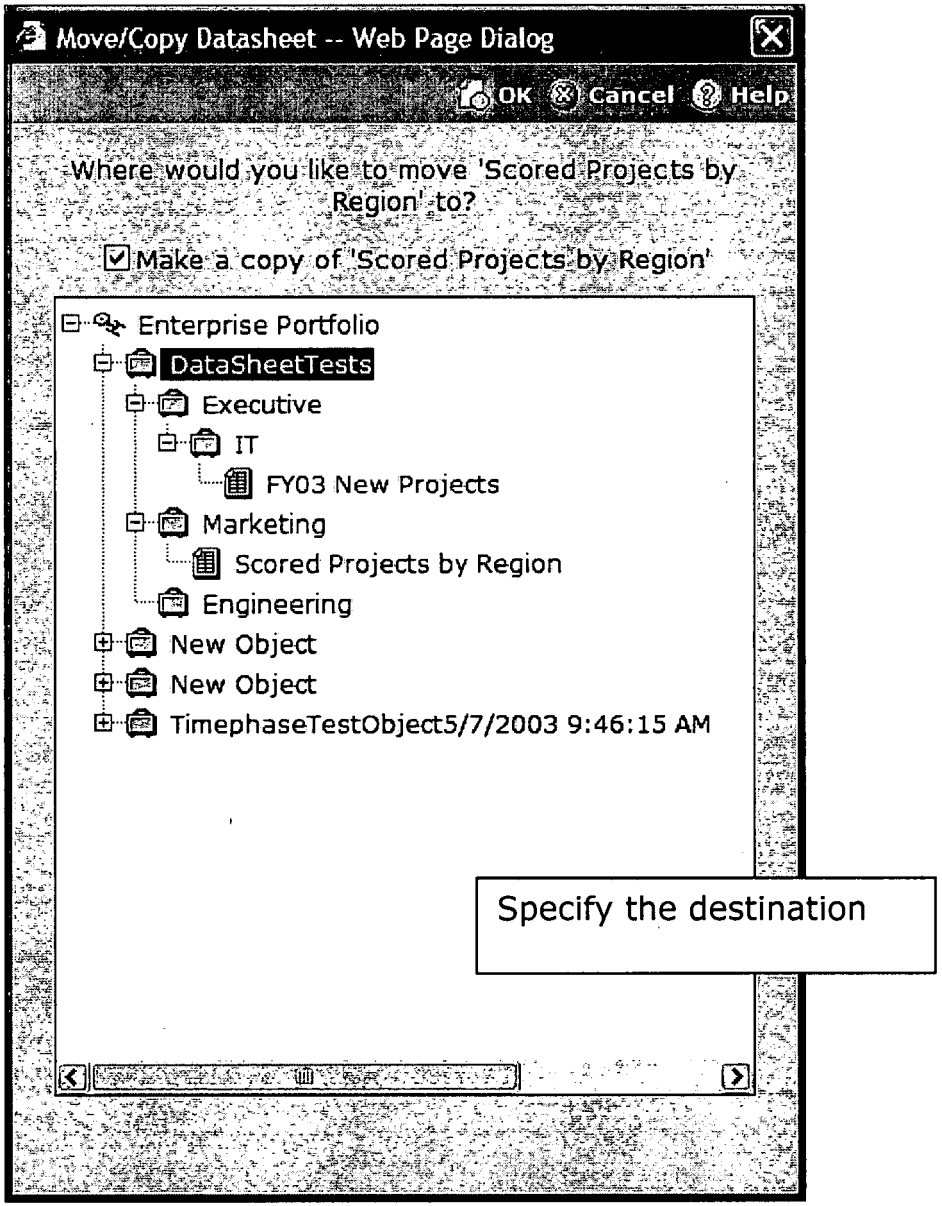

Portfolio Edge - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://localhost/peswebui/DatasheetView.aspx
edge
Portfolio Analyzer : Summary View
Settings Help Log Off
Actions Portfolios
Datasheet: Scored Projects by Region
Tasks
New Datasheet...
Move/Copy Datasheet...
Delete Datasheet...
Datasheet Properties...
Export Datasheet...
Other Views
Timegrid
Timeline
Charts
Other Modules
Portfolio Manager
Enterprise Portfolio
DataSheetTests
Executive
IT
FY03 New Projects
Marketing
Scored Projects by Region
Engineering
New Object
New Object
TimephaseTestObject5/7/2003
Save
Calculate
(ul) Page: 1 of 1
(ul) Rows Per Page: All
Name
Budget
Region
Score
Status
TotalCost
1 Region:2 $ 81,000.000 2 $ 72,000.000
2 Score:2 $ 27,000.000 2 $ 24,000.000
3 Project 3 $ 13,000.000 2 2 Green $ 12,000.000
4 Site Visit Project 2 $ 9,000.000 2 2 Red $ 8,000.000
5 Website Project 1 $ 5,000.000 2 2 Green $ 4,000.000
6 Score:3 $ 26,000.000 3 $ 23,000.000
7 Project 1 $ 11,000.000 2 3 Yellow $ 10,000.000
8 Site Visit Project 1 $ 8,000.000 2 3 Green $ 7,000.000
9 Website Project 3 $ 7,000.000 2 3 Red $ 6,000.000
10 Score:4 $ 28,000.000 4 $ 25,000.000
11 Project 2 $ 12,000.000 2 4 Red $ 11,000.000
12 Site Visit Project 3 $ 10,000.000 2 4 Yellow $ 9,000.000
13 Website Project 2 $ 6,000.000 2 4 Yellow $ 5,000.000
New datasheet viewed by default in the Summary view
Done
Local intranet

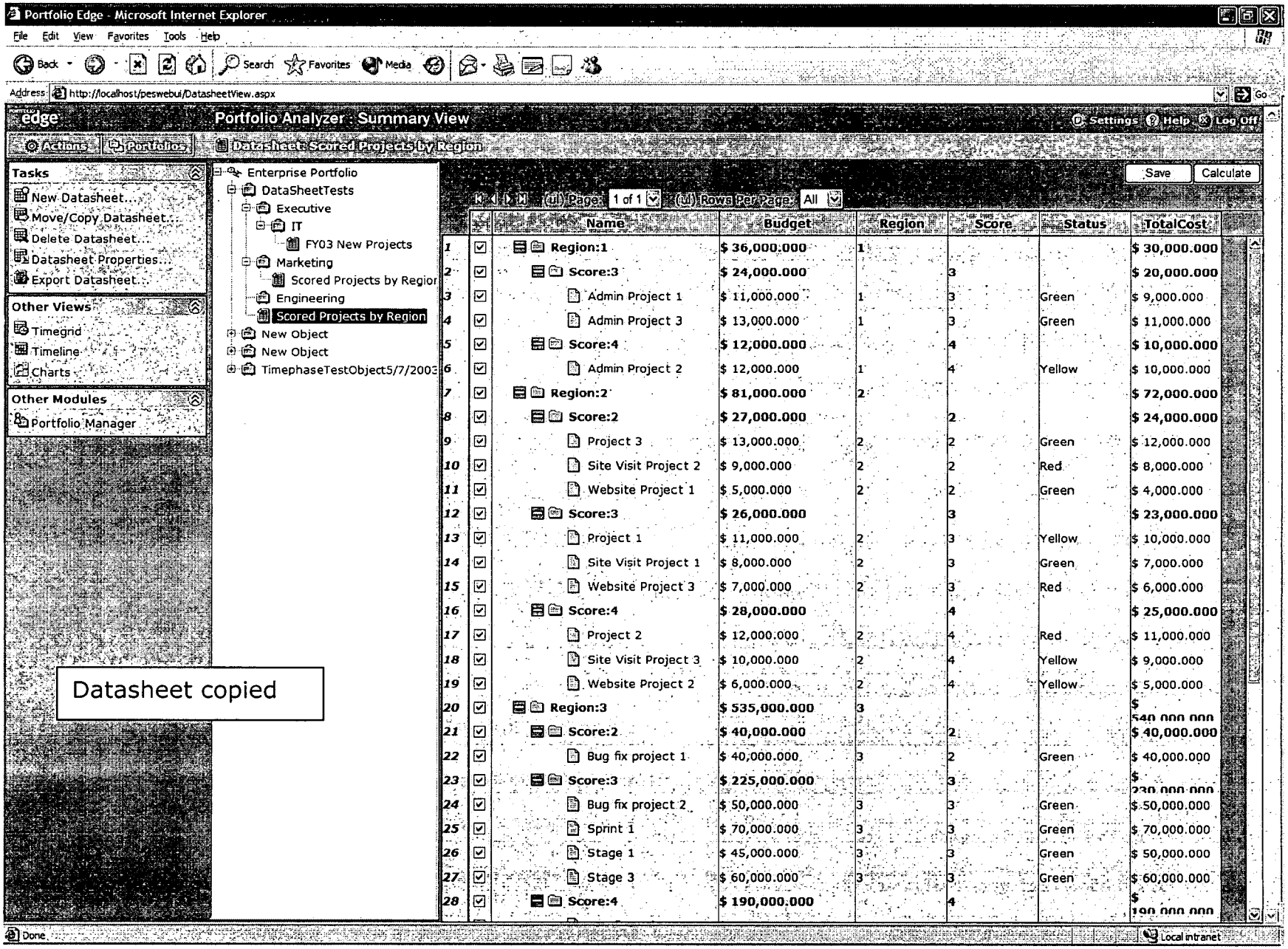

Portfolio Edge - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://localhost/peswebui/TimeGridView.aspx?PESWebState_ModuleId=2&PESWebState_ObjectId=33&PESWebState_ObjectUniqueId=NULL*Datasheet*NULL*33*-99999&PESWebState_RequiresSave=False&PESWebState_ViewId=5&
edge
Portfolio Analyzer :: Timegrid View
Settings Help Log Off
Actions Portfolios
Datasheet: Scored Projects by Region
Tasks
New Datasheet...
Move/Copy Datasheet...
Delete Datasheet...
Datasheet Properties...
Other Views
Summary
Timeline
Charts
Other Modules
Portfolio Manager
Enterprise Portfolio
DataSheetTests
Executive
IT
FY03 New Projects
Marketing
Scored Projects by Regior
Engineering
New Object
New Object
TimephaseTestObject5/7/2003
Display: Cashflow
Units: Currency
Dimension: Plan
Hide Null:
Period: Calendar Mo
Calculate
Save
Name
Budget
5/1/2003
6/1/2003
7/1/2003
8/1/2003
9/1/2003
10/1/2003
1 Region:2 81000 0 0 0 0 0 0
2 Score:2 27000 0 0 0 0 0 0
3 Project 3 13000 0 0 0 0 0 0
4 Site Visit Project 2 9000 0 0 0 0 0 0
5 Website Project 1 5000 0 0 0 0 0 0
6 Score:3 26000 0 0 0 0 0 0
7 Project 1 11000 0 0 0 0 0 0
8 Site Visit Project 1 8000 0 0 0 0 0 0
9 Website Project 3 7000 0 0 0 0 0 0
10 Score:4 28000 0 0 0 0 0 0
11 Project 2 12000 0 0 0 0 0 0
12 Site Visit Project 3 10000 0 0 0 0 0 0
13 Website Project 2 6000 0 0 0 0 0 0
Switch to Timegrid view ...
Done
Local intranet


Portfolio Edge - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://localhost/peswebui/DSChartView.aspx
edge
Portfolio Analyzer - Charts View
Settings Help Log Off
Actions
Portfolios
Datasheet: Scored Projects by Region
Tasks
New Datasheet...
Move/Copy Datasheet...
Delete Datasheet...
Datasheet Properties...
Add Chart...
Other Views
Summary
Timegrid
Timeline
Other Modules
Portfolio Manager
Enterprise Portfolio
DataSheetTests
Executive
IT
FY03 New Projects
Marketing
Scored Projects by Regior
Engineering
New Object
New Object
TimephaseTestObject5/7/2003
Move/Copy
Remove
Properties
Run Now
To view a chart, click on an entry from the list of charts appropriate for this datasheet and click the Run Now button.
By Region
Budget Analysis
Unallocated Budget
Overallocated Budget
Overallocated Budget
Name: Overallocated Budget
Description: Chart Description
Create four charts for this Datasheet
Done
Local intranet


Portfolio Edge - Microsoft Internet Explorer
Overallocated Budget
Score:2
Score:3
Score:4
$30,000.00
$25,000.00
$20,000.00
$15,000.00
$10,000.00
$5,000.00
$0.00
TotalCost
26000
27000
28000
Budget
POWERED BY pacificedge
X Axis:
Budget
Y Axis:
TotalCost
History:
Live data
Apply
Select Column Chart


Portfolio Edge - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://localhost/peswebui/DatasheetView.aspx
Go
edge
Portfolio Analyzer : Summary View
Settings Help Log Off
Actions
Portfolios
Datasheet: Scored Projects by Region
Tasks
New Datasheet...
Move/Copy Datasheet...
Delete Datasheet...
Datasheet Properties...
Export Datasheet...
Other Views
Timegrid
Timeline
Charts
Other Modules
Portfolio Manager
Enterprise Portfolio
DataSheetTests
Executive
IT
FY03 New Projects
Marketing
Scored Projects by Region
Engineering
New Object
New Object
TimephaseTestObject5/7/2003
Save
Calculate
Page: 1 of 1
Rows Per Page: All
Name
Budget
Region
Score
Status
TotalCost
1 Region:2 $ 81,000.000 2 $ 72,000.000
2 Score:2 $ 27,000.000 2 $ 24,000.000
3 Project 3 $ 13,000.000 2 2 Green $ 12,000.000
4 Site Visit Project 2 $ 9,000.000 2 2 Red $ 8,000.000
5 Website Project 1 $ 5,000.000 2 2 Green $ 4,000.000
6 Score:3 $ 26,000.000 3 $ 23,000.000
7 Project 1 $ 11,000.000 2 3 Yellow $ 10,000.000
8 Site Visit Project 1 $ 8,000.000 2 3 Green $ 7,000.000
9 Website Project 3 $ 7,000.000 2 3 Red $ 6,000.000
10 Score:4 $ 28,000.000 4 $ 25,000.000
11 Project 2 $ 12,000.000 2 4 Red $ 11,000.000
12 Site Visit Project 3 $ 10,000.000 2 4 Yellow $ 9,000.000
13 Website Project 2 $ 6,000.000 2 4 Yellow $ 5,000.000
Copy the datasheet to another portfolio object
Done
Local intranet


Move/Copy Datasheet -- Web Page Dialog
OK
Cancel
Help
Where would you like to move 'Scored Projects by Region' to?
Make a copy of 'Scored Projects by Region'
Enterprise Portfolio
DataSheetTests
Executive
IT
FY03 New Projects
Marketing
Scored Projects by Region
Engineering
New Object
New Object
TimephaseTestObject5/7/2003 9:46:15 AM
Specify the destination



		Name	Budget	Region	Score	Status	TotalCost
1	☑	**Region:1**	**$ 36,000.000**	1			**$ 30,000.000**
2	☑	**Score:3**	**$ 24,000.000**		3		**$ 20,000.000**
3	☑	Admin Project 1	$ 11,000.000	1	3	Green	$ 9,000.000
4	☑	Admin Project 3	$ 13,000.000	1	3	Green	$ 11,000.000
5	☑	**Score:4**	**$ 12,000.000**		4		**$ 10,000.000**
6	☑	Admin Project 2	$ 12,000.000	1	4	Yellow	$ 10,000.000
7	☑	**Region:2**	**$ 81,000.000**	2			**$ 72,000.000**
8	☑	**Score:2**	**$ 27,000.000**		2		**$ 24,000.000**
9	☑	Project 3	$ 13,000.000	2	2	Green	$ 12,000.000
10	☑	Site Visit Project 2	$ 9,000.000	2	2	Red	$ 8,000.000
11	☑	Website Project 1	$ 5,000.000	2	2	Green	$ 4,000.000
12	☑	**Score:3**	**$ 26,000.000**		3		**$ 23,000.000**
13	☑	Project 1	$ 11,000.000	2	3	Yellow	$ 10,000.000
14	☑	Site Visit Project 1	$ 8,000.000	2	3	Green	$ 7,000.000
15	☑	Website Project 3	$ 7,000.000	2	3	Red	$ 6,000.000
16	☑	**Score:4**	**$ 28,000.000**		4		**$ 25,000.000**
17	☑	Project 2	$ 12,000.000	2	4	Red	$ 11,000.000
18	☑	Site Visit Project 3	$ 10,000.000	2	4	Yellow	$ 9,000.000
19	☑	Website Project 2	$ 6,000.000	2	4	Yellow	$ 5,000.000
20	☑	**Region:3**	**$ 535,000.000**	3			**$ 540,000,000**
21	☑	**Score:2**	**$ 40,000.000**		2		**$ 40,000.000**
22	☑	Bug fix project 1	$ 40,000.000	3	2	Green	$ 40,000.000
23	☑	**Score:3**	**$ 225,000.000**		3		**$ 230,000,000**
24	☑	Bug fix project 2	$ 50,000.000	3	3	Green	$ 50,000.000
25	☑	Sprint 1	$ 70,000.000	3	3	Green	$ 70,000.000
26	☑	Stage 1	$ 45,000.000	3	3	Green	$ 50,000.000
27	☑	Stage 3	$ 60,000.000	3	3	Green	$ 60,000.000
28	☑	**Score:4**	**$ 190,000.000**		4		**$ 190,000,000**